

## Changes in the SERS Field Service Division

### *Dave Thomas Retires, Lee Brown Takes His Position*



After more than 20 years of service with SERS, Dave Thomas retired on July 1, 2001.

He began his state career at CMS Group Insurance Division in August of 1977. After spending 2 1/2 years with CMS, he accepted a position as head of the SERS Group Insurance Section in January 1980.

As supervisor of Group Insurance, Dave kept the various retiree associations updated on any changes to the State of Illinois Group Insurance program. During this time, he also established a trusting rapport with SERS retirees.

Dave transferred to the SERS Field Services section in October of 1993 as facilitator of the newly created post-retirement workshop *Myths & Realities of Retirement* (MRR). Under Dave's

stewardship, the MRR workshop matured in substance and grew in attendance.

This growth was largely a result of his popularity with our annuitants and his comprehension of the group insurance program. His concern for our annuitants and knowledge of retirement issues will be missed.



Lee Brown is a four-year Navy veteran. He is a graduate of Sangamon State University and began his state career at the Department of Revenue.

Lee transferred to the SERS Field Services division in September

of 1990 as a facilitator of the *Investing in Your Future* and *Countdown to Retirement* preretirement workshops. He also conducts Benefit Seminars and markets our workshops throughout eastern and southern Illinois.

With Dave Thomas' retirement, Lee will now become the facilitator of the MRR workshop. While he thinks this workshop is a very important benefit to SERS retirees, his major assignment will be maintaining the high standards that Dave established with the retiree associations throughout the state of Illinois.

You can reach Lee by telephone at 217-785-6976 or e-mail at lbrown@ser084r1.state.il.us.

## Annuitant Election Results



During the May SERS Board of Trustees election, Doris Clark, who ran unopposed, was reelected

as the annuitant trustee for a fourth five-year term beginning July 15.

Doris retired from the Department of Mental Health at the Jacksonville Developmental Center in 1980. She is president of AFSCME Illinois Retirees, Chapter 31, and vice chair of the SERS Board of Trustees. She resides in Jacksonville.

## Have You Moved?

If you plan on moving, be sure to notify the Vouchering section at 217-524-8806 of any change to your name or mailing address.

This small amount of information ensures the efficient distribution of your Annuitant Statement, Informer, 1099R form, and other important mailings. An incorrect address can keep this material from ever reaching you.

# Freedom of Information Act

As a result of new federal legislation, banks and credit card companies are required to disclose their privacy of information policies to their customers. While SERS is exempt from this law, now is a good time to reiterate our policy on the privacy and confidentiality of our records.

We do not sell our member's information to anyone, because we think it should remain confidential.

However, under the Freedom of Information Act we are required to provide, upon request, the following information about SERS benefits: name, department, benefit amount, length of service.

All other member records shall be kept confidential unless:

- The benefit recipient consents in writing to the release of the information.
- The information is requested pursuant to a subpoena or other legal process as provided by law.

# Changes to the Survivor Benefit

A question many of our representatives answer is about remarrying after the death of the retired member or the death of the member's spouse.

Legislation was passed last year that alters the SERS survivor benefit in the following ways.

## Married at Retirement

If a member is married at retirement and their spouse dies at a later date, the retired member can qualify a new spouse for the survivor benefit if they have been married for one full year before the member's death.

## Remarriage of a Survivor

Under the old law, if a survivor remarried before age 55 their SERS survivor benefit was terminated. Under the recent legislation, a survivor can remarry at any age without affecting their SERS benefit.

## No Qualified Survivor at Retirement

If a member has no qualified survivor at retirement, (s)he will receive a refund of their widow/survivor contributions with their first pension check.

If a member marries after retirement, (s)he can repay the widow/survivor contributions with interest, to qualify their spouse for the SERS survivor benefit. Once the contributions are repaid, if the spouse dies before the member, no refund is payable.

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appointed by the Governor

**Caryl Wadley-Foy**,  
elected state employee

**Doris M. Clark**, elected annuitant

**Joseph T. Pisano**,  
retiree appointed by the Governor

## SRS Web Site

Visit our web site at [www.state.il.us/srs](http://www.state.il.us/srs) to access information on our three retirement systems: State Employees', Judges' & General Assembly. There are also links to the State of Illinois and Social Security Administration home pages.



From the State Employees' Retirement System's home page you can view our latest publications and annual reports, download SERS forms, and link to federal and state tax forms.

The SERS home page also contains a Bulletin Board with articles pertaining to SERS members, and the Field Services area lists all of the preretirement workshop dates as well as other sources of information. In the future, our home page will allow you to access your account information and apply for benefits online.

# Keep Your Beneficiaries Current

Your named beneficiaries are located in the Death Benefits section of your Benefit Statement. It is your responsibility to keep your designations up-to-date.

Your SERS beneficiaries are separate from your Group Life Insurance and Deferred Compensation beneficiaries. The people listed on your Benefit Statement are designated to receive your SERS benefits only.

You may change your beneficiaries at any time by completing and filing a Nomination of Beneficiaries form. If you have questions about your nominated beneficiaries, call us at 217-785-6963.

## Don't Let Age Slow You Down

Here's another compelling reason to get up and get moving: Both the Surgeon General and the American Heart Association recommend that adults exercise 3-5 days per week for 30 minutes each for better health.

A recent study of men and women aged 60-79 who participated in a moderate walking program three days a week lowered their blood pressure significantly after six months, compared with a group that did nothing. Medical research suggests that besides lowering blood pressure, regular aerobic exercise can also reduce the risk of heart attacks and colon cancer.

The best way to stick with any exercise program is to choose activities that you like, start slowly, and be realistic about what you can do.

### SERS FACTOID

The average SERS retirement benefit is approximately \$1,260 per month.

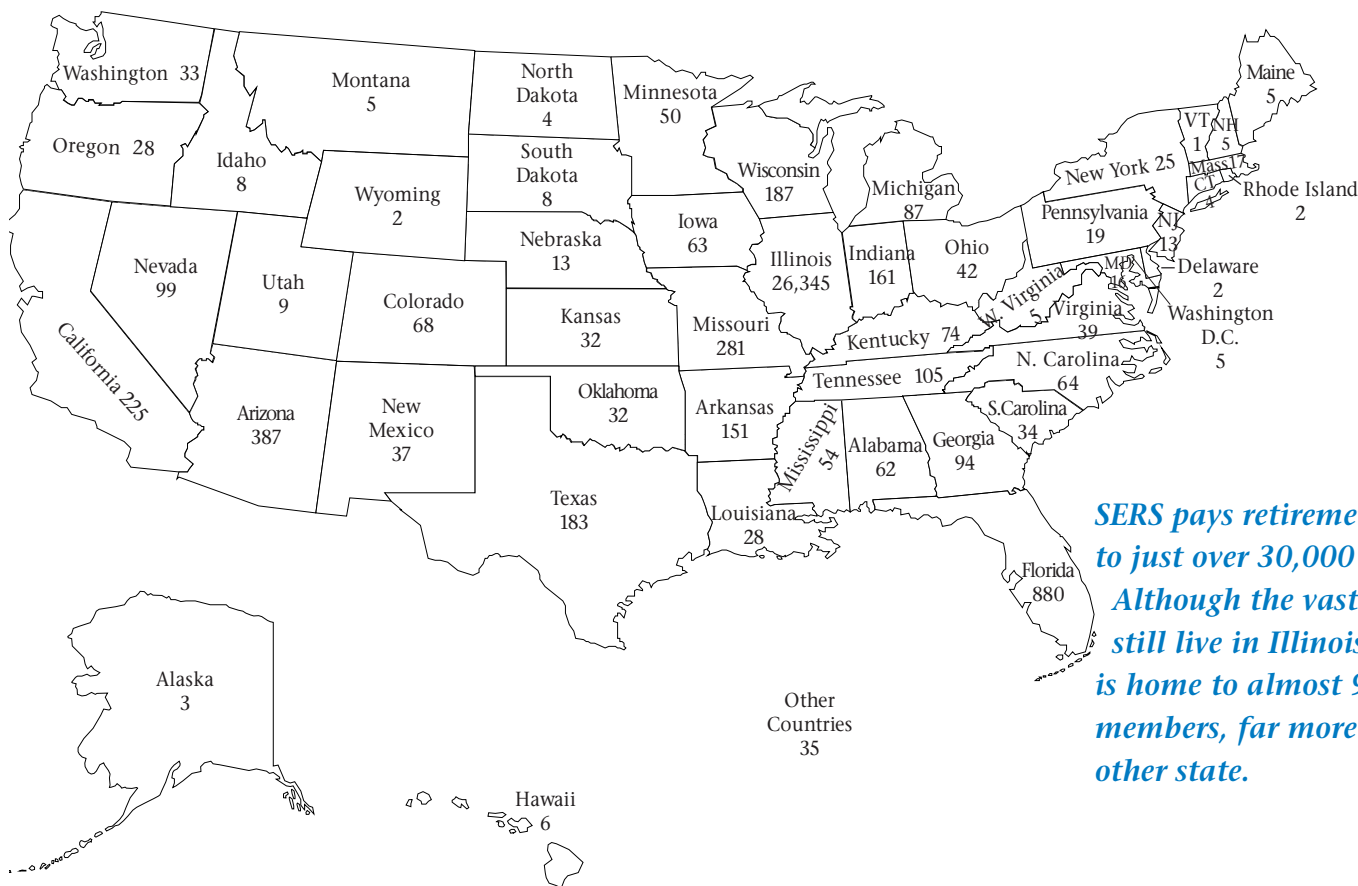
*The SRS Chicago office has relocated. The new address is:*

*State of Illinois Building  
160 N. LaSalle, Suite N725  
Chicago, IL 60601*

*The phone number is the same at 312-814-5853.*

*The new location is across the street from the old address.*

## Active Retirees by State



*SERS pays retirement benefits to just over 30,000 people. Although the vast majority still live in Illinois, Florida is home to almost 900 former members, far more than any other state.*

**Circle the 2002 MRR Workshop That You Would Like to Attend.**

Jan. 22	Normal (33)	Jul. 23	Peoria (13)
Feb. 19	Quincy (36)	Jul. 30	Carbondale (94)
Feb. 26	Springfield (01)	Aug. 13	Galesburg (23)
Mar. 5	Jacksonville (39)	Aug. 27	Rockford (10)
Mar. 12	Dixon (76)	Sep. 17	Rolling Meadows (79)
Mar. 26	Chicago (02)	Sep. 24	Effingham (67)
Apr. 2	Collinsville (15)	Oct. 1	Fairview Heights (18)
Apr. 16	Joliet (47)	Oct. 8	Rend Lake (21)
May 14	Bourbonnais (27)	Oct. 29	Springfield (01)
May 28	Taylorville (66)	Nov. 19	Peoria (13)
Jun. 4	Utica (30)	Nov. 26	Chicago (02)
Jun. 11	Urbana (03)	Dec. 3	Springfield (01)
Jun. 25	Rend Lake (21)	Dec. 10	Tinley Park (95)
Jul. 2	Chicago (02)		

Name \_\_\_\_\_

Social Security Number \_\_\_\_\_

Are You Bringing a Guest? \_\_\_\_\_

As Americans live longer, you can expect more years in retirement than adolescence. To help make these added years more meaningful and rewarding, SRS offers the ***Myths and Realities of Retirement*** workshop to retirees, survivors, disability benefit recipients and their guests.

This free, one-day workshop examines financial scams, the effects of inflation, estate planning, group insurance benefits, and health & leisure.

If you would like to attend an MRR workshop, complete the application and return it to us. After you are registered, we will confirm your enrollment by letting you know the exact workshop location.

***Return This Form To:***

State Retirement Systems, Field Services Division  
2101 S. Veterans Parkway  
P. O. Box 19255  
Springfield, IL 62794-9255

